



USDA Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Template Version 2.08

Required Report - public distribution

Date: 2/21/2007

GAIN Report Number: SP7010

Iberian Peninsula (Spain and Portugal)

HRI Food Service Sector

Annual

2007

Approved by:

Stephen Hammond

U.S. Embassy

Prepared by:

Arantxa Medina

Report Highlights:

The growing Iberian Peninsula (IP) Hotel, Restaurant and Institutional (HRI) sector provides excellent opportunities for U.S. food-ingredient and food-product exporters. Market access, however, can be complicated, requiring potential U.S. exporters to meet specific criteria and to take certain, identifiable steps before exporting.

Includes PSD Changes: No

Includes Trade Matrix: No

Annual Report

Madrid [SP1]

[SP]

INDEX

I. MARKET SUMMARY (Tables Updated Feb. 2007)	3
Spain	3
Economic Trends	3
PORTUGAL	4
Economic Trends	4
ADVANTAGES AND CHALLENGES FACING U.S. PRODUCTS IN THE IBERIAN PENINSULA	9
II. ROAD MAP FOR MARKET ENTRY (Charts and Tables Updated Feb. 2007)	9
A. Entry Strategy	9
B. Market Structure	10
C. Sub-Sector Profiles	12
1. Hotels	12
2. Restaurants	15
3. Institutional	16
III. Best Products Prospects	18
IV. Post Contacts and Other Information (Updated Feb. 2007)	18
Spain	18
Portugal	18
Spain	19
Trade Associations	19
Portugal	19

I. MARKET SUMMARY (Tables Updated Feb. 2007)

Spain

Economic Trends

	2001	2002	2003	2004	2005	2006 (2)	2007(3)
ECONOMIC TRENDS							
Inflation (%)	2.7	4.1	2.6	3.2	3.4	3.4	3.8
Unemployment (%)	13.1	12.4	11.7	11.0	9.2	8.6	8.3
GDP at Market Prices (%)	2.6	2.1	2.4	3.1	3.4	3.4	3.0
GDP per Capita (\$ Million)	19,691	20,227	21,271	23,644	27,256	29,266	31,727
AGRICULTURAL PRODUCTS IMPORTS (\$ Million) (1)							
Total Agricultural, Fish and Forestry Products	16,810	18,327	22,284	24,870	28,129	30,000	37,665
Total U.S. Agricultural, Fish and Forestry Products	1,128	1,132	1,310	1,301	1,185	1,250	1,573
Total Food Products	14,564	15,960	19,433	22,041	24,614	26,875	28,758
Total U.S. Food Products	875	899	1,050	1,049	954	1,063	1,138
Major Competitors:							
EU	8,260	9,121	11,294	13,226	14,535	15,907	17,185
France	2,472	2,704	3,357	3,690	4,238	4,642	4,967
United Kingdom	1,167	1,178	1,563	1,663	1,765	1,956	2,093
Netherlands	1,055	1,173	1,387	1,531	1,590	1,781	1,906
Germany	959	1,038	1,299	1,442	1,696	1,880	2,011
Other EU	2,607	3,028	3,688	4,900	5,246	5,647	6,208
Argentina	976	1,062	1,287	1,410	1,419	1,598	1,710
Brazil	656	607	905	1,134	1,104	1,265	1,354
Total Fish and Seafood Products	3,658	3,763	4,620	4,790	5,659	6,167	6,598
Total U.S. Fish and Seafood Products	71	62	80	83	78	86	92
Major Competitors:							
EU	1,383	1,561	1,807	2,005	2,205	2,441	2,611
France	278	307	394	419	385	451	483
United Kingdom	215	241	277	295	327	360	385
Netherlands	207	232	244	291	342	370	396
Denmark	160	177	217	225	267	280	300
Other EU	523	604	675	775	883	980	1,050
Morocco	281	314	370	374	477	510	546
Argentina	408	306	445	356	293	352	377

(1) GTA

FAS/Iberia (2) 2006 Estimates and (3) 2007 Forecasts using historical data and FAS/Iberia input, unless otherwise identified.

PORTUGAL

Economic Trends

	2001	2002	2003	2004	2005	2006 (2)	2007(3)
ECONOMIC TRENDS							
Inflation (%)	4.4	3.6	3.3	2.4	2.1	2.6	2.2
Unemployment (%)	4.1	5.1	6.4	6.7	7.6	7.7	7.6
GDP at Market Prices (%)	1.8	0.5	-1.2	0.8	0.4	1.2	1.5
GDP per Capita (\$ Million)	15,138	15,740	15,863	16,387	17,456	18,161	19,2885
AGRICULTURAL PRODUCTS IMPORTS (\$ Million) (1)							
Total Agricultural, Fish and Forestry Products	5,495	5,704	6,677	7,467	7,506	8,172	8,500
Total U.S. Agricultural, Fish and Forestry Products	244	275	292	289	292	312	330
Total Food Products	4,699	4,927	5,874	6,558	7,037	7,554	8,082
Total U.S. Food Products	202	233	241	234	236	254	272
Major Competitors:							
EU	3,281	3,498	4,331	4,805	5,005	5,515	5,901
Spain	1,733	1,778	2,307	2,468	2,681	2,928	3,133
France	592	576	679	728	718	764	818
Germany	264	291	341	394	449	496	530
Netherlands	177	239	306	375	325	409	437
Other EU	515	613	699	840	832	919	982
Brazil	200	203	239	365	311	381	408
Argentina	139	130	176	173	146	169	180
Total Fish and Seafood Products	913	921	1,065	1,183	1,322	1,412	1,496
Total U.S. Fish and Seafood Products	36	27	28	41	52	51	54
Major Competitors:							
EU	464	536	689	797	897	1,025	1,087
Spain	307	325	444	455	545	603	639
Sweden	12	22	34	90	82	103	109
Denmark	43	67	62	77	80	95	101
Netherlands	28	36	48	66	69	86	91
Other EU	74	86	101	109	121	138	147
Russia	65	61	83	101	91	110	116
Norway	107	89	57	56	52	50	50

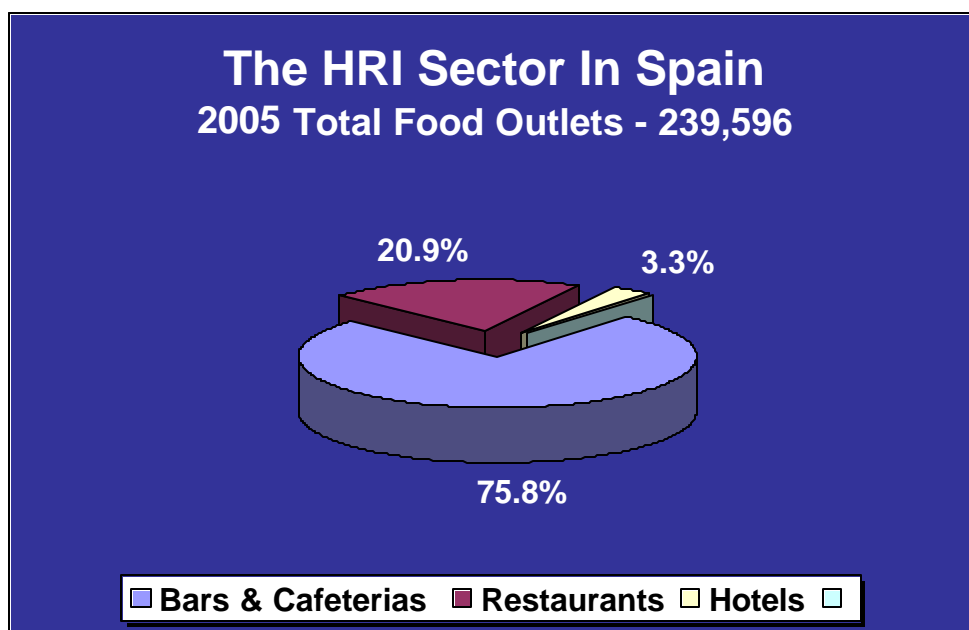
(1) GTA

FAS/Iberia (2) 2006 Estimates and (3) 2007 Forecasts using historical data and FAS/Iberia input, unless otherwise identified.

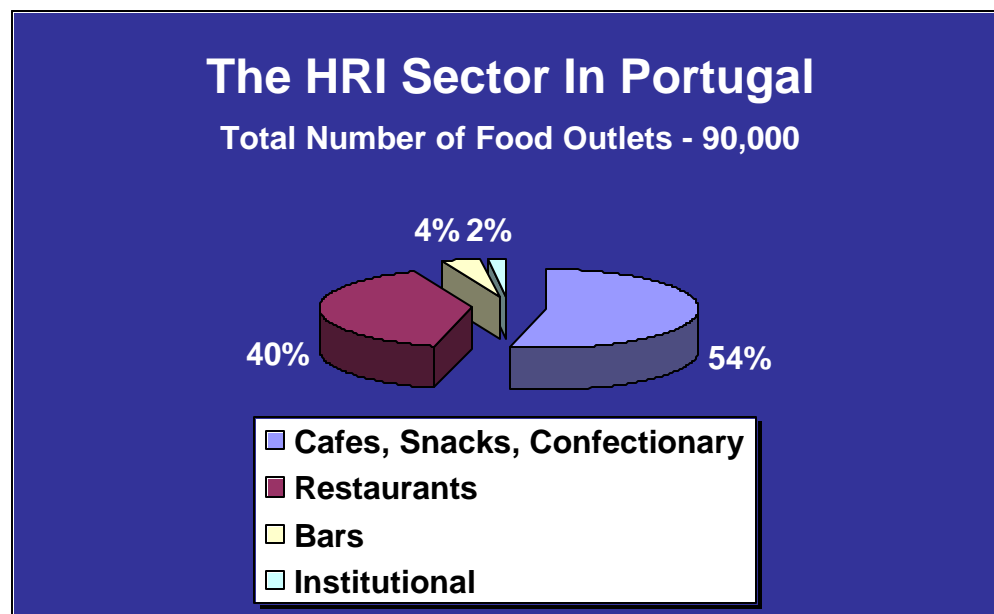
The Iberian Peninsula (IP) Hotel, Restaurant and Institutional (HRI) sector expanded significantly during the mid 80's and 90's and into 2006, as a result of the profound social and economic changes unleashed upon Spain's and Portugal's accession to the European Union (EU) in 1986. The expansion is not yet complete, nor has it slowed much over the years, so we expect that the sector will be of growing interest to some U.S. exporters.

Synopsis of the Iberian Peninsula HRI sector:

- The Iberian Peninsula is one of the top tourism destinations in Europe with the number of tourists increasing every year, boosting demand for meals in the HRI sector.
- In Spain, the HRI sector accounts for about one third of all food consumed.
- Restaurant chains, including ethnic and fast food, are gaining market share and are expected to continue growing.
- Consumption of ready-to-eat/take away food continues to grow as consumers substitute home-cooked for convenience and timesavings. Most hyper and supermarket chains now offer ready-to-eat/take away food, and there is an increasing number of food outlets specializing in take-away food, ranging from barbecue to more traditional meals.



Source: [MAPA](http://www.mapa.es/alimentacion/pags/consumo/2005/panel-05.pdf) – Ministry of Agriculture, Fisheries and Food
<http://www.mapa.es/alimentacion/pags/consumo/2005/panel-05.pdf>



Source: FAS Iberia estimates

The increase in local consumer (tourists excluded) spending on the HRI sector in Iberian Peninsula is due to:

- Smaller households – The number of households without children is increasing. The average family has one or two children per household. Also, single person households are increasing.
- Increasing number of women in the workforce – The percentage of women in the workforce is one of the highest within the EU, bolstering the demand for more ready-to-eat foods, as well as eating-out frequency.
- Change in eating patterns – The increased presence and success of ethnic foods from all over the world has particularly among the younger population.
- Aging population – Around 17 percent of the IP population is now over 60 years old, increasing the demand for senior citizens centers and/or facilities.

In Spain, the HRI sector currently accounts for 26.3 percent of all food consumed. In 2005, the sector increased by 6 percent to € 21,635 million and is expected to continue to increase at a similar pace.

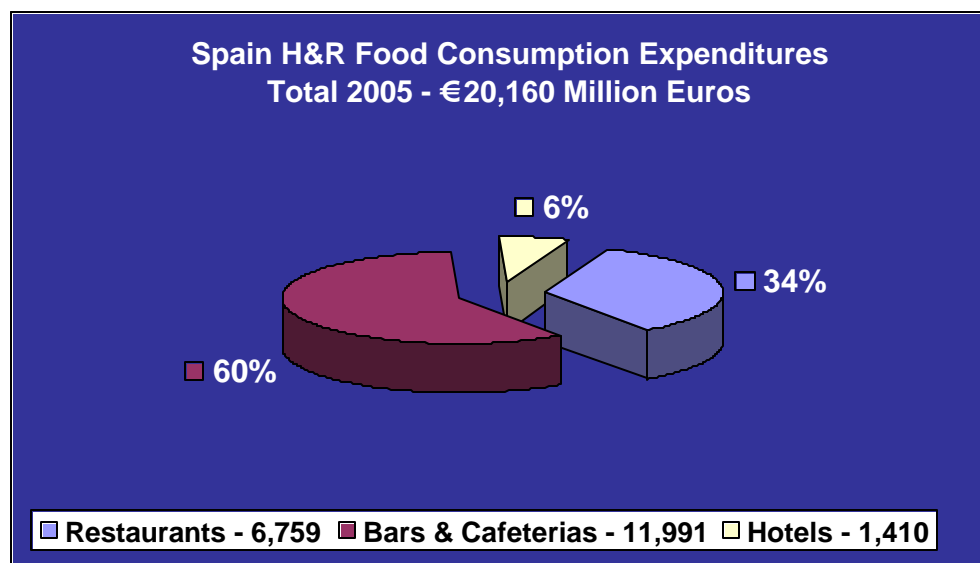
Spain Total Food Consumption Expenditures (Billion Euros)

	2001	2002	2003	2004	2005	2006 (1)	2007 (2)
Home	44.8	48.5	50.7	54.2	56.2	58	60
Hotel & Restaurants	15.5	16.5	17.5	19.2	20.2	22	25
Institutions	1.1	1.2	1.2	1.3	1.5	1.5	1.6
Total	61.4	66.2	69.4	74.8	77.8	81.5	86.6
% Increase	8.6	7.8	4.8	7.7	4.0	4.8	6.3

Source: [MAPA](http://www.mapa.es/alimentacion/pags/consumo/2005/panel-05.pdf)

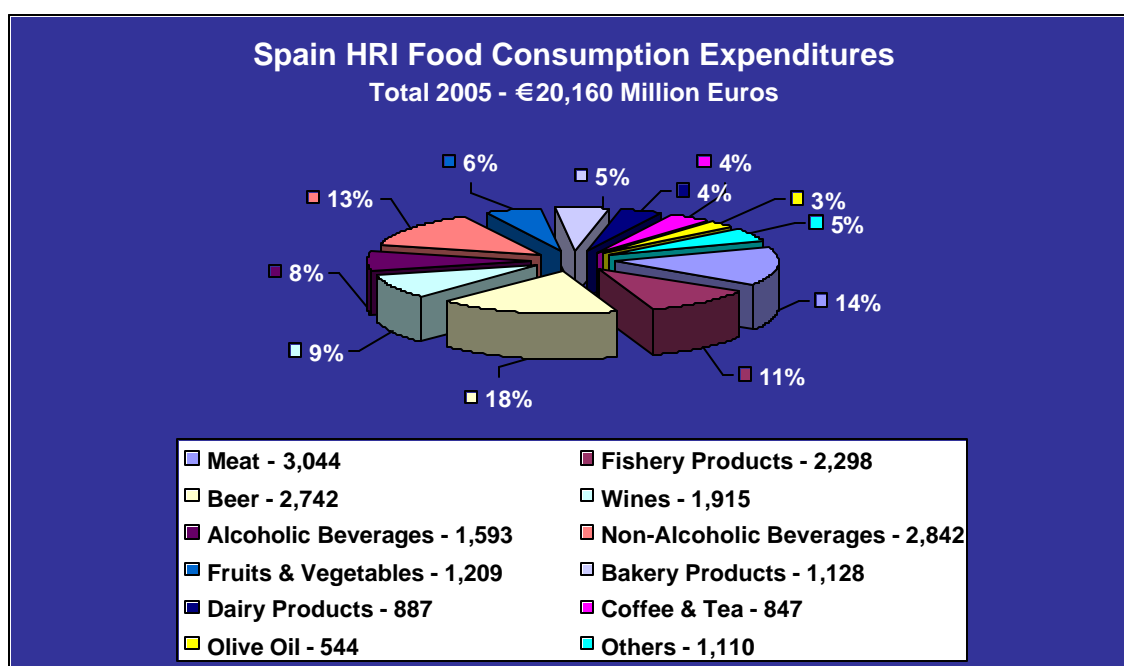
<http://www.mapa.es/alimentacion/pags/consumo/2005/panel-05.pdf>

FAS/Iberia (1) 2006 Estimates and (2) 2007 Forecasts using historical data and FAS/Iberia input, unless otherwise identified.



Source: [MAPA](http://www.mapa.es/alimentacion/pags/consumo/2005/panel-05.pdf)

<http://www.mapa.es/alimentacion/pags/consumo/2005/panel-05.pdf>



Source: [MAPA](http://www.mapa.es/alimentacion/pags/consumo/2005/panel-05.pdf)

<http://www.mapa.es/alimentacion/pags/consumo/2005/panel-05.pdf>

Spain HRI Food Consumption Expenditures HOME vs HRI

PRODUCT	2005		2006 (1)		2007 (2)	
	HOME	HRI	HOME	HRI	HOME	HRI
	(Million Euros)					
Meat Products	13,266	3,423	13,930	3,453	14,114	3,746
Fishery Products	7,922	2,411	8,152	2,661	8,445	2,887
Fruits & Vegetables	9,094	1,294	9,415	1,216	10,016	1,319
Dairy Products	6,915	1,435	7,215	1,454	7,629	1,577
Bakery Products	5,995	1,244	6,354	1,237	6,694	1,342
Coffee & Tea	525	866	555	862	604	935
Olive Oil	1,486	515	1,467	453	1,591	491
Wine	903	2,056	961	2,057	1,053	2,232
Beer	653	2,751	691	2,556	750	2,774
Non-Alcoholic Beverages	1,252	1,735	1,328	1,779	1,441	1,930
Alcoholic Beverages, Except Wine & Beer	341	1,595	360	1,715	390	1,861
Other Food Products	7,823	2,310	8,141	2,721	8,338	2,952
Total	56,175	21,635	58,569	22,163	61,065	24,047
Total HOME + HRI	77,810		80,732		85,112	

Source: [MAPA](http://www.mapa.es/alimentacion/pags/consumo/2005/panel-05.pdf) - <http://www.mapa.es/alimentacion/pags/consumo/2005/panel-05.pdf>

FAS/Iberia (1) 2006 Estimates and (2) 2007 Forecasts using historical data and FAS/Iberia input, unless otherwise identified.

ADVANTAGES AND CHALLENGES FACING U.S. PRODUCTS IN THE IBERIAN PENINSULA

Advantages	Challenges
The IP tourism industry is pushing up demand for more international foods.	Food imported from third countries, including the U.S., must comply with EU food, labeling and traceability regulations, including the labeling of any foods that contain biotechnology ingredients. Requirements, in many cases, differ from those in the United States.
Food products in the market are becoming more diversified.	Competition from neighboring EU countries with the same food and labeling laws, and where tastes and traditional products may be well known.
IP consumers higher incomes and change in consumption habits, including the increased frequency of eating out.	Higher prices for U.S. food products relative to local market and/or imports from neighboring EU countries.
U.S. producers offer quality and a variety of products for the food service industry.	IP importers and consumers still have limited knowledge of the quality and diversity of U.S. food products.

II. ROAD MAP FOR MARKET ENTRY (Charts and Tables Updated Feb. 2007)

A. Entry Strategy

Successful introduction of U.S. products in the Iberian Peninsula market will likely require local representation, personal contact, and/or access through a major EU-based importer. A local representative can provide up-to-date market intelligence, guidance on business practices and trade related laws, sales contact with existing and potential buyers, and market development expertise. The Offices of Agricultural Affairs in Madrid and Lisbon maintain listings of potential importers and are developing sector-specific information to help you introduce your product in the IP market.

U.S. processed food exporters now face even greater challenges in the IP market, because of the new EC labeling and traceability regulations. Any product that contains genetically modified ingredients must be labeled so that the consumer can distinguish the product. Because IP consumers don't yet have familiarity with genetically modified foods the HRI sector, food processors and retailers are reluctant to purchase these processed products or food ingredients for processing.

We are also developing a series of product-specific market access reports that are/will be available to U.S. exporters (please see [SP5037](#), [SP6002](#) and [SP6017](#)). Spain and Portugal generally apply EC rules and regulations, however, there are subtleties that you should learn about if you are thinking of exporting to the IP market. These reports will help you decide how to approach the IP market. For more information, we invite potential U.S. exporters to contact us directly.

In general terms, U.S. exporters already exporting to other EU Members will likely be meeting most of the requirements for exporting into the IP. Typically, food products are imported by an importer, broker and/or wholesaler or distributor. They also supply the HRI sector.

The following documents are required for ocean or air cargo shipments of foodstuffs to Spain and Portugal:

Bill of Lading and/or Airway Bill;

Commercial Invoice;

Phytosanitary Certificate and/or Health Certificate (when applicable)-- If your product is or contains plant or animal products, it will require a phytosanitary certificate issued by the competent U.S. authority. Also, if you are exporting animal products, your plant has to be approved to export into the EU;

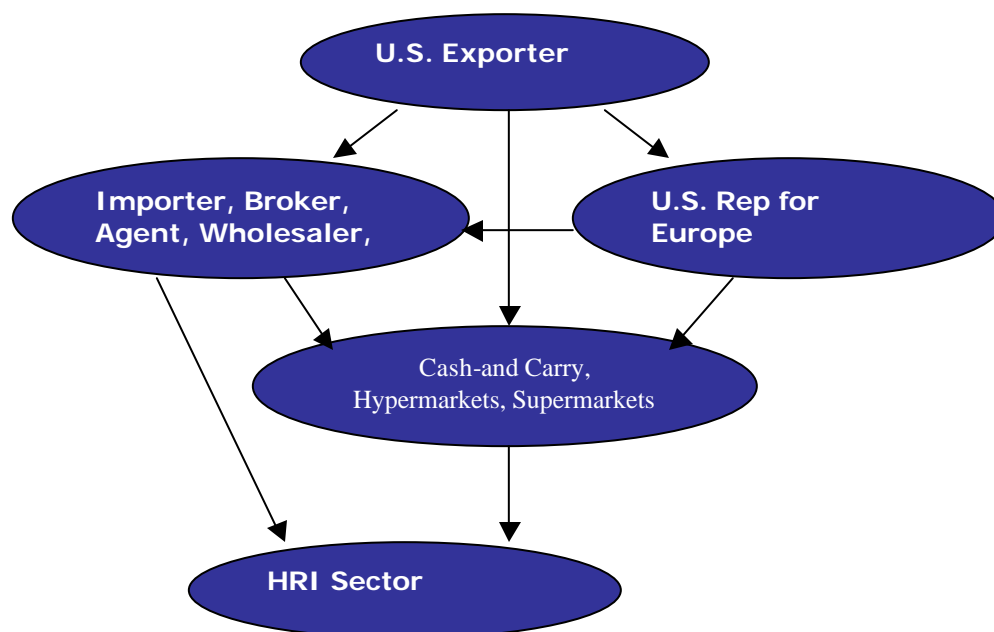
Import Certificate--most food products require an Import Certificate issued by the competent Spanish or Portuguese authority. However, the Import Certificate is obtained by the Spanish or Portuguese importer and/or the agent involved in the business and is intended for tariff classification purposes.

For more information on import and inspection procedures please see SP6018 at <http://www.fas.usda.gov/gainfiles/200607/146208239.doc> and PO6009 at <http://www.fas.usda.gov/gainfiles/200606/146198024.doc>

These reports should be read in conjunction with the equivalent report done by the FAS Office in the U.S. Mission to the European Commission (USEU), E35162 at <http://www.fas.usda.gov/gainfiles/200508/146130611.doc>

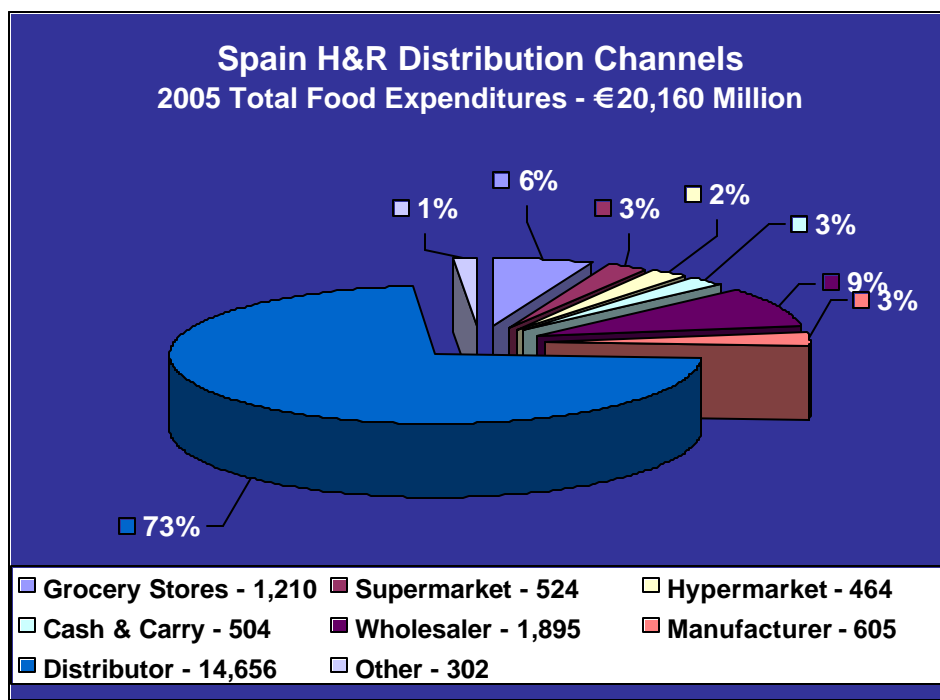
Also, please check the U.S. Mission to the European Union webpage at <http://useu.usmission.gov/agri/fairs.html>, which will guide you on exporting into the EU.

B. Market Structure



The IP HRI sector's supply channels are diverse and serve small and large customers with different needs. Beverage suppliers are very specialized since most beverage consumption takes place in bars, cafeterias and restaurants. The most important HRI sector suppliers are:

- Importers and Wholesalers--More specialized by product segment, importers and wholesalers also supply directly the HRI sector, particularly the restaurant and hotel chains.
- Commercial distributors--play an important role in the supply of the food and beverages needs of many small and diverse food service providers.
- Wholesale Markets--Most perishable products are purchased at the wholesale market. The HRI sector is, by tradition, a net consumer of fresh produce.
- Cash-and-Carry--Open only to businesses and offering very competitive prices, they supply a wide variety of food products, from perishable to non-perishable, domestic and imported. Some cash-and-carry chains have developed outlets that only service the HRI sector.
- Super and Hypermarkets--Very important to the HRI sector when considering "last minute" purchases. Also important due to their convenient locations.
- Local Producers--Some players in the HRI sector buy directly from local producers, particularly if they are located close to major markets. The IP food service sector has a tradition of using fresh produce in their day-to-day menus. Many restaurants and hotels, particularly along the coasts, buy directly from local producers and fishermen.



Source: [MAPA](http://www.mapa.es/alimentacion/pags/consumo/2005/panel-05.pdf)

<http://www.mapa.es/alimentacion/pags/consumo/2005/panel-05.pdf>

C. Sub-Sector Profiles

1. Hotels

The Iberian Peninsula is one of the top tourism destinations in Europe. The tourism infrastructure is well developed throughout both Spain and Portugal and is continuously expanding since tourism is a very important sector for the economies of both countries. During 2006:

- In Spain, total sales in the hotel sector are estimated at almost € 17 billion.
- In Portugal, total sales in the hotel sector are estimated at € 6 billion.
- In Portugal, tourism niche markets have been identified, like golf tourism, with some new, top-quality resorts now under construction.

The Iberian Peninsula Hotel Sector-- 2006

	Spain	Portugal
Total Number of Hotel Units	12,332	1,954
Total Number of Beds	993,023	253,927
Nights Spent (Million)	266	37.5

Source: Spanish & Portuguese National Statistics Institute – INE
<http://www.ine.es/> - <http://www.ine.pt/>

Spain – Main Tourism Areas 2006 Total Number of Nights Spent – 266 Million

Tourism Areas	Nights Spent
Costa Blanca	15,264,786
Costa del Sol	15,790,497
Costa de Barcelona	11,371,133
Isla de Tenerife	20,991,992
Costa Brava	10,750,938
Isla de Mallorca	40,842,713
Palma-Calvia	17,716,116
Sur de Tenerife	15,638,609
Isla de Gran Canaria	13,398,117
Sur de Gran Canaria	12,296,978
Total	174,061,879

Source: INE – www.ine.es
<http://www.ine.es/inebase/cgi/um?M=%2Ft11%2Fe162eoh&O=inebase&N=&L=0>

Spain – Main Hotel Chains - 2006

Company Name	Food Sales	Nationality	No. of Hotels	Purchasing Agent
Sol Melia Hotels & Resorts	N/A	Spanish	162	Distributors, Cash-and-Carry, Importers, Wholesalers
RIU Hotels	N/A	Spanish/ 50% owned by Germany	48	Distributors, Cash-and-Carry, Importers, Wholesalers
NH Hoteles	N/A	Spanish	121	Distributors, Cash-and-Carry, Importers, Wholesalers
Iberostar Hotels & Resorts	N/A	Spanish	37	Distributors, Cash-and-Carry, Importers, Wholesalers
Barcelo Hotels & Resorts	N/A	Spanish	48	Distributors, Cash-and-Carry, Importers, Wholesalers
Group H10 Hotels	N/A	Spanish	36	Distributors, Cash-and-Carry, Importers, Wholesalers
Fiesta Hotel Group	N/A	Spanish	30	Distributors, Cash-and-Carry, Importers, Wholesalers
Princess Hotels & Resorts	N/A	Spanish	20	Distributors, Cash-and-Carry, Importers, Wholesalers
Husa Hoteles	N/A	Spanish	79	Distributors, Cash-and-Carry, Importers, Wholesalers
AC Hotels	N/A	Spanish	69	Distributors, Cash-and-Carry, Importers, Wholesalers
Accor Hotels	N/A	French	57	Distributors, Cash-and-Carry, Importers, Wholesalers
Hoteles Hesperia	N/A	Spanish	44	Distributors, Cash-and-Carry, Importers, Wholesalers

Source: Hostelmarket

Spain has 280 hotel chains with 450,233 rooms that account for just over 50 percent of all tourist beds in Spain. The top ten chains accounts for 16.7 percent of the total, slightly down from 16.9 percent in 2005.

The Portuguese Hotel Sector – 2006
Total number of nights spent – 37.5 Million

Region	No. Of Nights
Mainland Portugal	30.5
North	3.8
Center	3.5
Lisbon & Tagus Valley	8.1
Alentejo	1.0
Algarve	14.1
Azores Islands	1.2
Madeira Islands	5.8
Total Portugal	37.5

Source: INE – www.ine.pt <http://www.ine.pt/prodserv/indicadores/ultindic.asp?tema=H>

Portugal – Main Hotel Chains - 2006

Company Name	Food Sales	Nationality	No. of Hotels	Purchasing Agent
Pousadas de Portugal	N/A	Portugal	45	Distributors, Cash-and-Carry, Importers, Wholesalers
Pestana Pousadas	N/A	Portugal	40	Distributors, Cash-and-Carry, Importers, Wholesalers
Grupo Pestana Pestana Hotels & Resorts	N/A	Portugal	20	Distributors, Cash-and-Carry, Importers, Wholesalers
Grupo Amorim/Accor	N/A	Portugal/France	30	Distributors, Cash-and-Carry, Importers, Wholesalers
Grupo Vila Gale	N/A	Portugal	14	Distributors, Cash-and-Carry, Importers, Wholesalers
Choice Hotels	N/A	UK	12	Distributors, Cash-and-Carry, Importers, Wholesalers
Sol Melia Group	N/A	Spain	13	Distributors, Cash-and-Carry, Importers, Wholesalers
The Tivoli Hotels Group	N/A	Portuguese	12	Distributors, Cash-and-Carry, Importers, Wholesalers

Source: [Direccao Geral do Turismo](http://www.dgturismo.pt)
http://www.dgturismo.pt/stellent/groups/publico/documents/relatorio/id_006660.pdf

2. Restaurants

The Iberian Peninsula food service sector expanded significantly in the last couple of decades as noted previously. Although traditional restaurants still dominate, changes in the eating habits and lifestyles of Spaniards and Portuguese have accelerated the increase of chain restaurants, including fast-food and ethnic restaurants. New types of “healthy” fast food restaurants have emerged, as have salad and gourmet bars, vegetarian restaurants, as well as soup bars. Under the speciality food sector, coffee shops and ice-cream shops are also growing very rapidly. Food Courts and other types of food service establishments, located in modern shopping and entertainment centres are very popular and attract a continuously growing number of customers. Fast food chains, restaurants and coffee shops consider such places as key locations for their business. Restaurant chains buy their food products from either local or larger EU-based suppliers in some cases consolidating purchases for the entire chain.

Spain – Leading Fast Food Chains – 2006

Company Name	No. Of Outlets 2005	No. Of Outlets 2006 (Estimated)	Purchasing Agent
Telepizza	533	540	Importers, Distributors, Wholesalers
Pans & Company/Bocatta	394	420	Importers, Distributors, Wholesalers
Burger King	376	400	Importers, Distributors, Wholesalers
McDonald's	353	373	Importers, Distributors, Wholesalers
Pizza Hut	134	131	Importers, Distributors, Wholesalers
Big Dog	90	91	Importers, Distributors, Wholesalers
Rodilla	75	83	Importers, Distributors, Wholesalers
100 Montaditos	68	99	Importers, Distributors, Wholesalers
Pizza Movil	61	71	Importers, Distributors, Wholesalers
Kentucky Fried Chicken	48	60	Importers, Distributors, Wholesalers

Source: HostelMarket for 2005, FAS Iberia estimates for 2006

Portugal – Leading Fast Food Chains - 2006

Company Name	No. Of Outlets 2005	No. Of Outlets 2006 (Estimate)	Purchasing Agent
McDonald's	113	117	Importers, Distributors, Wholesalers
Pizza Hut	85	87	Importers, Distributors, Wholesalers
Telepizza	68	79	Importers, Distributors, Wholesalers
Pans & Company	33	42	Importers, Distributors, Wholesalers
Loja das Sopas	31	31	Importers, Distributors, Wholesalers
A Cascata	24	25	Importers, Distributors, Wholesalers
O Kilo	20	21	Importers, Distributors, Wholesalers
Pasta Café	19	20	Importers, Distributors, Wholesalers
Burger King	17	20	Importers, Distributors, Wholesalers
KFC	15	16	Importers, Distributors, Wholesalers

Source: Sector Magazines for 2005, FAS Iberia Estimates for 2006

3. Institutional

The Iberian Peninsula institutional food service is dominated by the big multinationals, where the top ten companies are responsible for 50 percent of total sales. In addition there are hundreds of local small companies providing catering and events services, but are difficult to account for in term of units and sales. In general terms:

- Every year, an increasing number of institutions, including businesses and industries, schools, health and welfare and many others are contracting their meals to catering companies.
- Spanish total sales of the institutional food sector are estimated at €2.2 billion, on 400 million meals. The sector is expected to continue increasing at around seven percent a year.
- Portuguese total sales of the institutional food sector are estimated at €525 million, on 150 million meals. The sector is expected to continue increasing at around five percent a year.

Large institutional food service companies are price sensitive, importing directly, and/or buying products, particularly fresh produce, from local suppliers.

The Iberian Peninsula Institutional Food Sector by Segment - 2006

	Business & Industry		Education		Health/Welfare		Other Segments		Total	
	Million €	%	Million €	%	Million €	%	Million €	%	Million €	%
Spain	425	19	805	36	693	31	313	14	2236	100
Portugal	242	46	105	20	137	26	42	8	525	100

Source: FAS Iberia estimates

Spain – Leading Institutional Food Sector Companies – 2006

Company	Total Sales (Million €)	No. Of Meals (Millions/Year)	Purchasing Agent
Eurest Colectividades, S.A.	217	N/A	Direct, Importer, Wholesaler
Grupo Arturo Cantoblanco	185	N/A	Direct, Importer, Wholesaler
Serunion, S.A. (Grupo)	170	N/A	Direct, Importer, Wholesaler
Aramark Servicios de Catering	135	N/A	Direct, Importer, Wholesaler
Sodexho España, SA	110	N/A	Direct, Importer, Wholesaler
Eurest, SA (Airline Catering)	102	N/A	Direct, Importer, Wholesaler
Grupo Paradis	80	N/A	Direct, Importer, Wholesaler
Compagnie des Wagons Lits España	69	N/A	Direct, Importer, Wholesaler
Gate Gourmet Spain	68	N/A	Direct, Importer, Wholesaler
Mediterranea de Catering	60	N/A	Direct, Importer, Wholesaler

Source: Hostelmart

III. Best Products Prospects

Tree Nuts
Fish and Seafood, fresh and frozen
Pulses
Snack foods
Speciality foods

IV. Post Contacts and Other Information (Updated Feb. 2007)

If you have any questions or comments regarding this report or need assistance exporting to Iberian Peninsula, please contact the Office of Agricultural Affairs in Madrid at the following address:

Foreign Agricultural Service
American Embassy, Madrid
PSC 61, Box 20
APO AE 09642
Tel. 34-91 587 2555
Fax: 34-91 587 2556
Email: Aglberia@usda.gov
<http://www.embusa.es/>

American Embassy, Madrid
C/ Serrano, 75
28006 Madrid
Spain

Please consult our home page for more information on exporting U.S. food products to the Iberian Peninsula, including:

Spain

The Exporter Guide, SP6025 at: <http://www.fas.usda.gov/gainfiles/200609/146249056.doc>

The Retail Food Sector, SP6039 at:
<http://www.fas.usda.gov/gainfiles/200701/146279917.doc>

The Food Processing Sector, SP7005 at:
<http://www.fas.usda.gov/gainfiles/200702/146280113.doc>

Portugal

The Exporter Guide, PO6012 at: <http://www.fas.usda.gov/gainfiles/200609/146249055.doc>

The Retail Food Sector, PO6039, at:
<http://www.fas.usda.gov/gainfiles/200701/146279917.doc>

The Food Processing Sector, PO7002 at:
<http://www.fas.usda.gov/gainfiles/200702/146280114.doc>

Importer lists are also available from our office to exporters of U.S. food products. A list of trade associations and useful government agencies is provided below:

Spain

Trade Associations

FIAB- Federación de Industrias de Alimentación y Bebidas
(Spanish Federation of Food and Beverage Industries)

www.fiab.es

fiab@fiab.es

FEHR – Federación Española de Hostelería
(Spanish Federation for HRIs Sector)

www.fehr.es

fehr@fehr.es

ASEDAS – Asociación Española de Distribuidores, Autoservicios y Supermercados
(Spanish Association for Distributors and Supermarkets)

www.asedas.es

info@asedas.org

ANGED – Asociación Nacional de Grandes y Medianas Empresas de Distribución
(National Association of Midsize and Large Distributors)

www.anged.es

anged@anged.es

Government Agencies

Imported Foodstuffs, Infections and Compound Residues, Health Certification, Port Inspection and EU Alerts

Subdirección General de Sanidad Exterior

Ministerio de Sanidad y Consumo

http://www.msc.es/Diseno/informacionProfesional/profesional_sanidad_exterior.htm

saniext@msc.es

AGENCIA ESPAÑOLA DE SEGURIDAD ALIMENTARIA (AESa)

Spanish Food Safety Agency

<http://www.aesa.msc.es/aesa/web/AESA.jsp>

comunicacionaes@msc.es

Dirección General de la Industria Agroalimentaria y Alimentación

Ministerio de Agricultura, Pesca y Alimentación

Ministry of Agriculture, Fisheries and Food

<http://www.mapa.es/es/alimentacion/alimentacion.htm>

Portugal

Trade Associations

APED-Associação Portuguesa de Empresas de Distribuição
(Portuguese Association of Distribution Companies)
www.aped.pt

ARESP-Associação da Restauração e Similares de Portugal
(Portuguese Associations for HRIs Sector)
www.aresp.pt
aresp@aresp.pt

FIPA-Federação das Indústrias Portuguesas Agro-Alimentares
(Federation of the Agro-Food Portuguese Industries)
www.fipa.pt
info@fipa.pt

Government Agencies

Autoridade de Segurança Alimentar e Económica
(Portuguese Food Safety Authority)
www.dgfaq.min-agricultura.pt
direccao@dgfcqa.min-agricultura.pt

Direcção Geral da Alfandega e Dos Impostos Especiais sobre o Consumo
(General Directorate for Customs and Special Taxation on Consumption)
www.dgaiec.min-financas.pt
dgaiec@dgaiec.min-financas.pt

Direcção Geral da Alfandega e Dos Impostos Especiais sobre o Consumo
(General Directorate for Customs and Special Taxation on Consumption)
Direcção de Serviços do Licenciamentos **(Import Certificates)**
www.dgaiec.min-financas.pt
dsl@dgaiec.min-financas.pt

For more information on exporting U.S. agricultural products to other countries, please visit the Foreign Agricultural Service home page at www.fas.usda.gov.